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PATENT & TRADEMARK OFFICE

Docket No.: 03188/100H005-US1
(PATENT)

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

In re Patent Application of:
Richard Ruben et al.

Application No.: 09/704,322 Confirmation No.: 4924

Filed: November 2, 2000 Art Unit: 3629

For: SYSTEM AND METHOD FOR MANAGING REAL ESTATE Examiner: N. Vig

DECLARATION UNDER 37 C.F.R. 1.131

Commissioner for Patents
P.O. Box 1450
Alexandria, VA 22313-1450

Dear Sir:

Declarant, Gordon D. Coplein, hereby states:

1. I am a member of the Bar of the State of New York and am associated with the firm of Darby & Darby, 805 Third Avenue, New York, New York 10022, attorneys of record in this application.

2. I prepared and prosecuted the subject application and the Provisional application Serial No. 60/221,652, filed July 28, 2000 (Exhibit A). Therefore, I have full knowledge of the facts set forth herein.

3. The purpose of this Declaration is to establish facts to show a date of prior invention, i.e., to "swear behind", patent U.S. 6,993,576 to Labedz, which was newly cited as a reference in the first Office Action Final Rejection of March 13, 2006 in this

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application and on which the claims were rejected. As shown on the first page of the Labedz patent (Exhibit B), it was granted on January 31, 2006., and has a U.S. filing date of June 13, 2000 for the purpose of 35 U.S.C. §102(e).

4. As stated on the front page of the Declaration (Exhibit C), filed November 2, 2000 in this application, priority is claimed from the Provisional Application.

5. The assignee of the subject application Workspeed, Inc. contacted me at a time prior to June 13, 2000 for advice on how to protect its real estate management system. At that time, I was advised that work had been underway in writing the software (actual code) for the system.

6. I requested the client to prepare written material that could be used to form the basis for preparing a patent application since the software code itself would not, in my opinion, be adequate.

7. On June 7, 2000, the client sent me a document that had been prepared as per my request. A copy of this document is attached as Exhibit D and is dated 6-7-00 on its pages.

8. Attached as Exhibit E is a true and accurate copy of the e-mail from Bruce Deming, the attorney for Workspeed. At the top is my reply, dated June 7, 2000. This shows receipt of the disclosure of Exhibit D.

9. After receiving the disclosure (Exhibit D), I commenced with the preparation of the subject non-provisional application based on the information of Exhibit D. In July 2000, I decided it would be useful to file a provisional application to better establish the assignee's rights in the invention. The Provisional Application (Exhibit A) was filed on July 28, 2000.

10. A comparison of the disclosure document (Exhibit D) with the Provisional application filed on July 28, 2000 (Exhibit A) shows that it is the very document that was used as the document for the Provisional Application. Every page of the Provisional Application has printed on it the date June 7, 2000 (6-7-00). The first pages of both Exhibits have a grid showing a document preparation date of 6-4-00 and that it was prepared for my use.

11. Attached as Exhibit F is my handwritten note dated September 28, 2000 to my secretary Maureen O'Beirne to give the attached drawing to a draftsman (Eugene Latluga) to prepare formal drawings for the application. The drawing page shows date of 6-6-00 and was a precursor of the final version having the date 6-7-00 as in Exhibits A and D. The drawing of Exhibit F is the same that appears on page 15 of the disclosure (Exhibit D) and of the Provisional Application (Exhibit A). Work performance on the subject application basically involved placing the material of the disclosure into a format more usual to U.S. patent practice during the period June-November 2000.

I hereby declare that all statements made herein of my own knowledge are true and all statements made on information and belief are believed to be true; and further that these statements were made with the knowledge that willful false statements and the like so made are punishable by fine or imprisonment, or both, under Section 1001 of Title 18 of the U.S. Code and that such willful false statements may jeopardize the validity of the application or document or any registration resulting therefrom.

May 12, 2006

Gordon D. Coplein

MAY-19-2004 01:19 From:GORDON COPLEIN 770 393 2616 To:12127536237 P.4/6

EXPRESS MAIL CERTIFICATE

Date 7/28/00 Label No. EL628221771

I hereby certify that, on the date indicated above I deposited this paper or fee with the U.S. Postal Service and that it was addressed for delivery to the Commissioner of Patents & Trademarks, Washington, DC 20231 by "Express Mail Post Office to Addressee" service.

D B Peck

Name (Print)

Signature

PLEASE CHARGE ANY DEFICIENCY UP TO $300.00 OR CREDIT ANY EXCESS IN FUTURE FEES DUE WITH RESPECT TO THIS APPLICATION TO OUR DEPOSIT ACCOUNT NO. 04-0100

DARBY & DARBY P.C.

805 Third Avenue
New York, New York 10022
212-527-7700

File No: 3188/0H005

Date: July 28, 2000

Hon. Commissioner of
Patents and Trademarks
Washington, DC 20231

Sir:

Enclosed please find a provisional application for United States patent as identified below:

Inventor/s (ALL inventors, including NAME, plus city and state of RESIDENCE for each):
Richard RUBEN, 130 Lincoln Avenue, Purchase, New York 10577;
Gilles QUERU, 14946 Rancho Antiguo, Del Mar, California 92014;
Eric MONTEIL, 115 Fey Drive, Burlingame, California 94010

Title: METHOD OF MANAGING REAL ESTATE

including the items indicated:

1. Specification and 0 claims:

2. [] Drawings, _ sheet (Fig.)

3. [] Assignment for recording to:

4. [] Verified Statement Claiming Small Entity Status

PROVISIONAL PATENT APPLICATION COVER SHEET

5. [X] Check in the amount of $150.00, ($ filing; $ recording)

Respectfully submitted,

Gordon D. Coplein
Reg. No. 19,165
Attorney for Applicant(s)

3188/0H005

WORKSPEED

Workspeed Version 1 Overview
- For Patent Application -

Project name	Workspeed Version 1.0
Version	1
Document Type	Overview Document to support the Workspeed patent application
Scope	All modules for Version 1.0
Audience	Gordon D Coplein, Esq. Bruce Deming, VP & Corporate Counsel

1 Revision History

#	Date	Who	Changes
1	6-4-00	Melissa Gregson	• Initial Version
2			•
3			•
4			•
5			•
6			•
7			•

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D B Peck
Name (Print)
Signature

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3 Overview

Workspeed is building a web based workflow application service to help automate and facilitate processes and communications for large scale commercial office buildings. Property owners, property managers/building staff, tenant office managers and vendors will use the system.

The WorkSpeed product will be:

1) a simple and intuitive interface enabling enhancement of the workflow and communication processes between owners, tenants, property management and vendors

2) a secure and scalable web-based application allowing for different levels of customization and personalization.

To help define the scope of the initial design, the following list identifies key functionality proposed for Version 1. These functions are grouped into logical modules to facilitate rapid development, (e.g. each module can be worked on independently and handed off between specifications, ui, coding and testing teams).

Module Name	Key Functionality Supported in Version 1
Administration o ***Includes functions to set up and maintain properties, entities and users. Also includes processes for user sign in, uploading and management of site content.***	➢ <u>Initial Property Set Up</u> includes the actions required to implement the Workspeed product to each property. • **Create a domain for each property location** to support the product, this includes all development/implementation set up activities. • **Establish a property profile** with information specific to the building, including number of floors, suites and associated square footage, etc. • **Establish an entity profile** for the property owner (Individual or Institutional) and the property management company. The entity profile will include specific information about the company. • **Associate property location(s) to each property owner and property management entity profile.** Entities that represent the property ownership and property management may have more than one property operating the Workspeed product. An association between these entities and each location will be made to facilitate access to multiple properties, using the product, along with minimizing redundancy of entity profile information and the process of entity profile set up. • **Create the primary user profile(s) for the property owner and property management entity profiles.** The property owner company and the property management company will have people on their staff enabled to access and interact with the product. Each person with access will have a user profile. See the User Profile Set Up process. • **Configure User Role Categories.** A definition for each entity role will be configured for the property. This information will determine the experience and interaction authority for each user. Information on the Property Owner, Property Management Company and the primary users, for each entity, will be input into the product. These groups will be responsible, initially, for ramping up other entities and users of the product, such as Tenants and Vendors and their

Module Name	Key Functionality Supported in Version 1

	primary users.
	• **The primary user profile, for each entity, will be responsible for creating user profiles for their staff.** Included in the set up of user profiles is the assignment of a user role category.
	
	➢ <u>Ongoing maintenance</u>
	• Processes for uploading and managing new content to the site.
	• Processes for implementing updates to the configuration of the product including:
	  • Create New Entity Profile
	  • Create New User Profile
	  • Update/Edit an Existing Property Profile
	  • Update/Edit an Existing Entity Profile
	  • Update/Edit an Existing User Profile
	  • View an Existing Property Profile
	  • View an Existing Entity Profile
	  • View an Existing User Profile
	  • Deactivate Property Profile
	  • Deactivate Entity Profile
	  • Deactivate User Profile

Service Request
 	
• ***Enables users to initiate service requests using a web-based tool and a standard process***
• ***Facilitates the communication between the user initiating a service request and the user(s) responsible for fulfilling the request by integrating web and wireless technology***
• ***Enhances the overall experience associated with submitting a service request by providing point-in-time status on all requests***
• ***Provides the capability to associate costs and detail information to all service requests initiated and fulfilled within a property***
	• ***Supported Service Requests and Associated Functionality***
	  • See matrix, Section 4.
	
	• ***Create or Update a Service Request*** using the Workspeed product. Actions that initiate a service request, including any updates to existing service requests, ability to view or print a service request, cancel an existing request and access completed/archived service requests. Preventative Maintenance requests (scheduled), Includes Ad Hoc service request, (requests created by the property engineering staff).
	  • Create a Service Request
	  • Update an existing Service Request
	  o Add additional information to an existing Service Request
	  o Update the status or information specific to the completion of a Service Request
	  o Cancel an existing Service Request
	  • View or Print a Service Request
	  o Existing Service Request
	  o Closed Service Request
	  • Authorize a new Service Request
	  • Request additional information on a Service Request
	  • Delegate a Service Request (within Property Mgmt group)
	  o Sign Off on a Service Request
	
	• ***Fulfillment Workflow*** includes all the actions within the Workspeed product once a service request has been created or

Module Name	Key Functionality Supported in Version 1
	updated. The routing/assignment of a service request to the appropriate individuals for authorization and completion of actions required to fulfill the request. o Includes the business rules and routing logic for the requestor to the users completing the request. o These are sub components of the Workflow process. Depending on the variability of the request, some actions associated to sub components of the workflow process may be skipped. The defined business rules will drive these processes. The integration of other communication tools to support the completion of a service request and meet the primary objectives of the Workspeed service request process include the use of email, wireless devices and potentially other tools that can be used to supplement the overall process. • ***Actions and Processes Completed Outside*** the Workspeed product. In version 1.0, some actions required to accurately complete a service request will need to be completed using "as is" processes. These outside processes include the ability to associate costs to a service request, purchase ordering, request for proposal and work authorizations.
Communications o ***Includes announcement and messaging functions to facilitate communication between different users of the Workspeed product.***	• **Announcements.** This feature allows property managers and owners the ability to "publish" a public announcement to all users of the Workspeed product at a specific property location. A one to two line announcement summary will appear on key screens of the user interface. Users can then click to access detailed information provided in the announcement. Specific functionality for the announcement feature includes: o Viewing, Creating, Saving Draft, Deleting Draft, Publishing, Expiring, Filing and Publishing via email. • **Messages.** This feature allows Workspeed users the ability to create, send and track messages to other Workspeed users and/or to individuals and companies who do not use Workspeed. Specific functionality for messaging includes: • Creating • Viewing • Sending • Deleting • Saving Draft • Audit Trail • Categorizing • Ability to use dynamically created address lists from the Workspeed system, based on the users role category • In addition to the above features, all Workspeed participants can add, edit, and delete private e-mail addresses.
Customer Service • ***Includes functions to facilitate communication***	The Workspeed product is a web-based system that will evolve over time to meet the needs •

Module Name	Key Functionality Supported in Version 1
with the Workspeed Product Support team and the ability for all users to provide feedback on the Workspeed product.	• **Messaging to/from Workspeed Customer Service** • **User Feedback tracking, analysis and reporting.**

Building Information
• ***Serves as a repository and access mechanism for information relating to a building, its owner, management, tenants, vendors, and operations. Some of the information is "public" and accessible to anyone who visits the site, while other information is "private" and accessible only to those Workspeed users who sign into the system and have the appropriate user role category.***
	• **Static Documents** – These are electronic documents that are not modifiable directly in the Workspeed system, but can be created or updated directly in their native applications. Any pertinent hard copy documents will be converted to electronic format, and stored in the system as PDF, MS Word documents, or any other applicable format. Users will be able to access various documents for viewing, and uploading new or edited versions, depending on their user role category.
	
	• The static documents processed by the system are: building policies & procedures, construction rules and regulations, emergency procedures, cleaning specifications, leases, vendor contracts, schedule of contracts, tenant office policies & procedures, employee directories, tenant CAD drawings, contact lists, and life safety designations.
	
	Interactive Information – These are forms that contain active fields from which data may be used in the system processes. These key data fields are captured during entity profile setup in the Administration module. This key data is associated to business entities with in the system, and is accessible based on the user entity role and user role level. Data contained in these fields:
	  ◦ Can direct and provide information to service request workflows and other parts of the system (e.g. pre-populating fields and choices to help simplify the user experience).
	  ◦ May contain values to be used in fee/accounting calculations
	  ◦ Can be analyzed and categorized for use in reports
	  ◦ The interactive information processed by the system are: lease abstracts, vendor service contract abstracts, property management abstracts, insurance certificates, building directories, employee directories, and stacking plan data.
	
	Specific functionality to support building information includes:
	
	• <u>Document Creation</u>
	  ◦ Create Interactive Information
	  ◦ Upload Static Documents
	
	• <u>Document Viewing / Printing / Searching</u>
	
	• <u>Document Updating / Editing / Detaching</u>
	  ◦ Update/Edit Interactive Information
	  ◦ Upload (updated) Static Documents

Module Name	Key Functionality Supported in Version 1
	○ Deactivate Interactive Information ○ Unload Static documents ○ Archive Old Documents (interactive and static)
Reporting • ***Includes functions to capture and summarize current and historical data from the product.***	• Version 1 will include up to approximately ten pre-configured and printable reports. Reports will be developed to meet the needs of the following user segments: ○ Owners ○ Property Managers ○ Workspeed Business Development
Building Portal • ***Commerce - This will be the framework to allow users access to goods and services provided by Workspeed e-commerce partners.*** • ***Content - Relevant content targeted to the various customer segments to help increase traffic and commerce on the Workspeed site.*** • ***Community - Features enabling open communication forums between users, such as interactive bulletin boards.***	The needs, wants and preferences of each primary Workspeed customer segment are diverse. By creating different "portal" views we will be able to make each user's experience more relevant to them. • Tenant office managers are prime candidates for e-commerce opportunities. Initial research has shown that this segment will be more likely to participate in online commerce at Workspeed if provided customized content and community features. Also, this segment will use the workflow application much less and consequently the portal will be more important to them. The Version 1 feature set to support the office manager portal includes: • **Commerce** Targeted to products and services highly relevant to tenant office managers. • **Content** Initial content topics for the office manager segment include: Buyers Guides, Feature Articles, Newsletters, Quick Tips, Advice Column and an Information Directory. • **Community** Initial bulletin boards will focus on the office manager customer segment. • All other Workspeed Modules will be included, but less prominent in this view. • Property management staff are more focused on the Workspeed application itself. They will use the Workspeed system as an integral tool to do their job. Consequently, their portal view will predominately feature the service request, communication, admin, building info and reporting modules. • Owners are primarily interested in aggregated views of their building(s) and the impacts on operating costs and revenues. Therefore their portal view will mainly be focused on summarized information on the service request module and on the reporting module. All other Workspeed Modules will be included, but less prominent in this view.

4 Service Request Types

Type of Service Request	Service Request Description	Immediate Request	Shared Resource Request
1. Lighting	Repair, adjustment or replacement of lighting fixtures or associated parts/materials	X	
2. Comfort (Heat/Cool)	Temperature adjustment to specific areas of the building	X	
3. Freight Elevator	Reserve the freight elevator		X
4. Building Conference Center	Reserve conference center space		X
5. Loading Dock	Reserve loading dock space		X
6. HVAC OT	Designate time for air conditioning after normal business hours		
7. Electrical	Repair, adjustment or replacement of electrical parts/materials	X	
8. Janitorial/Extra Cleaning	Specified cleaning other than scheduled cleaning service	X	
9. Trash / Rubbish	Removal and/or disposal of trash other than scheduled pick up	X	
10. Plumbing	Repair or replacement of plumbing parts/materials	X	
11. Doors / Equipment	Install, repair, adjustment or replacement of building doors or building equipment	X	
12. Security	New/cancelled security passes or specified security need	X	
13. Restroom supplies	Repair or replacement of restroom supplies and/or equipment	X	
14. Valet Parking	Car retrieval or specified need associated to building parking	X	
15. Elevator Breakdown	Repair of elevator equipment	X	
16. General Repair /Maintenance	Repair and maintenance requests that fall outside of the specified SR types	X	
17. Preventative Maintenance	Recurring activities required for the maintenance of the building. (Weekly, Monthly, Annually, etc.)	Recurring	
18. Other	All other requests that fall outside of the specified types	X	

5 Property/Entity/Entity Role Category and User Role Category Definition

It is important to understand the hierarchy of information within the Workspeed product. The hierarchy of information drives how associations are recognized and ensures consistency among the various layers of information throughout the system. The hierarchy is ultimately responsible for access and interaction rights in supporting the product functionality.

The Hierarchy:
Within each Workspeed property there are many different business entities interacting with each other. Tenants communicate and make requests with Property Management, Vendors who support the building in various capacities and Owners who require the best possible operating model for the property to ensure occupancy and efficiency. These are just a few examples. However, it is important to understand how information is associated and categorized within the product. See the diagram below for an overview of the hierarchy and reference the following content for a definition of the hierarchy components.

Hierarchy Rules

An Entity must be associated to a Property

Property to Entity is a One to Many relationship

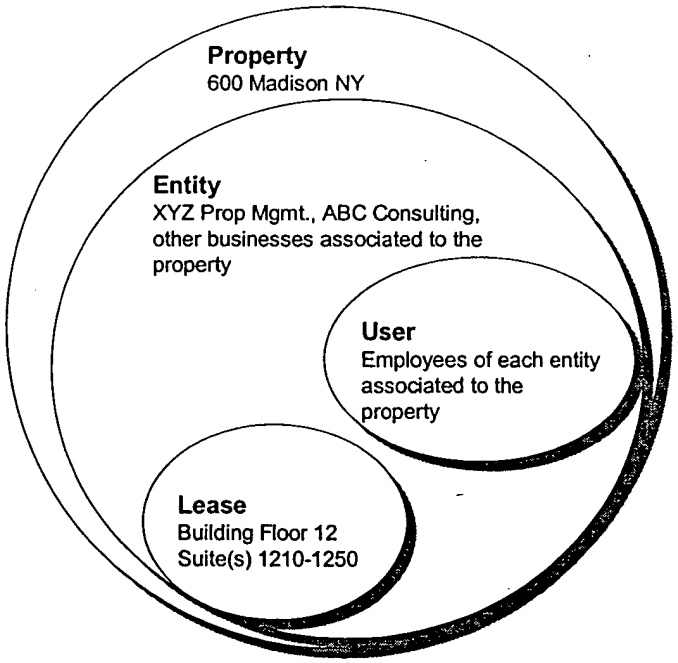
Each entity is categorized into a Role (Property Owner, Property Management, Tenant and Vendor)

A Lease is associated to space within the property
A Lease is associated to one tenant entity
A Lease is associated to one property ownership entity
A Lease is associated to one property management entity
Entity to Lease is a one to many relationship

Each User must be associated to an Entity

Entity to User is a One to Many relationship

Each User is assigned a privilege level



Property:
A ***Property*** represents the physical location of a commercial office building where business entities conduct their day-to-day business operations. Within the Workspeed design, a property also represents the web site supporting the version 1.0 functions, for example: 600Madision.com

Entity:
An ***Entity*** represents a business organization with employees who either work in the property or interact with other organizations and/or people in the property. Examples of entities include: Tenants who lease office space in a

property, the company that manages the property, various vendors who support the property, and the individual or institutional ownership of the property itself.

Entity Role Category:
Business entities that interact with a property have been categorized into six different roles. The ***Entity Role Category*** represents a single entity or group of entities with common attributes, interaction and experience within the Workspeed product. The role is an important component in determining the attributes the user is enabled to perform. For example: The Property Ownership entity (Property Owner Role) and its associated employees (users) will not have the same attributes and views available as the employees (users) associated to a cleaning company (Vendor Role).

The following table provides an example of the different entity role categories supported in the product. Each entity must be categorized by a role.

Entity Role Category	Example
System Administration	Workspeed Inc.
Property Owner	Lawrence Ruben, Shorenstein
Property Management	XYZ Management Co.
Tenant	Partech, ABC Consulting, BankAmerica
Vendor	Bay City Cleaning Services
Lease	National Guarantor Bank, Prudential Insurance

User:
Within each entity, there will be multiple users. A ***User*** is person who works for an entity that interacts with the property. Users will sign in with an id and a password and perform various functions supported in the Workspeed product. For example: ABC Consulting leases office space in the property (600 Madison). Cindy is an employee of ABC Consulting and will be enabled to sign into the product and have access to set of attributes. Cindy represents a user of the Workspeed product.

Lease:
A ***Lease*** represents a section of space within a property. Typically defined by building floor(s) and associated suite(s). The lease will contain the terms of the space such as rate and square footage. The lease and its associated space will be contracted to one tenant entity. A lease may have sub tenants entities associated as well.

Space:
The ***Space*** is an object that represents the tenant and management accessible areas of a property. These spaces could be suites, floors, elevators, common conference rooms, gyms, loading docs, bathrooms, hallways, lobbies, etc. The space concept is used to direct service request workflows, and to assign management and ownership responsibilities to the various property management and ownership entities related to the property.

5.1 User Role Category

Each User of the Workspeed product will have access to a set of defined attributes based on their Entity Role Category. However, there is an additional layer within the Entity Role Category of each entity that determines the specific authorization levels and attributes associated to each User. Each user will have a ***User Role Category*** assigned. The user role category will define which group(s) of attributes the user can access. The incorporation of user role category enables the ability to drive the workflow processes and other forms of interaction and maintenance of the product, differently for users within the same Entity Role Category. *For example*, the difference in authority and user needs between the Leasing Agent and the Chief Engineer. Both of these users are categorized as the Property Management Entity Role, and in this example they could work for the same Property Management entity. However, within the Workspeed product, these users have different needs and functions to perform. When each user's profile is created, (see Profile Set Up 4.3) a user role category is assigned.

Users are associated to an entity and an entity can be associated to multiple entity role categories. For each entity role that an entity has, the user can have a specified user role category.

For example: R. Ruben is a user for the Property Ownership entity of Lawrence Ruben Inc. Lawrence Ruben Inc. owns the property at 600 Madison. Lawrence Ruben Inc. is also a tenant of the property at 600 Madison. R. Ruben (user profile) is associated to one entity (Lawrence Ruben Inc.) and for each of its roles (Property Owner and Tenant) R. Ruben has an associated user role category.

The table below provides an illustration of the user role category for the various entity roles within a property. This diagram is an example. Once all the functionality associated with the Workspeed product has been fully designed, the user role categories will be assigned sets of attributes.

Role	Example of Entity	User Role Category	Example: Description of User Role Category
Tenant	Tiffanys	600Mad_Ten_UR_1	Office Manager
		600Mad_Ten_UR_2	Office Manager Asst
		600Mad_Ten_UR_3	Tenant Employee
Property Owner	Lawrence Ruben	600Mad_Own_UR_1	Primary Owner Representative
		600Mad_Own_UR_2	Secondary Owner Representative
Property Management	XYZ Management	600Mad_Prop_Mgt_UR_1	Primary Property Manager
		600Mad_Prop_Mgt_UR_2	Property Mgmt. Assistant
		600Mad_Prop_Mgt_UR_3	Chief Engineer
Vendor	Corporate Cleaning Company	600Mad_Ven_UR_1	Manager
		600Mad_Ven_UR_2	Employee
Lease	National Guarantor Bank	600Mad_Lea_UR_1	Guarantor

The user role category derived includes the property location, the role and associated user role. The User Role Category will be associated to the user ID. During sign in/validation of the user ID, all the User Role Categories associated to a user ID will be returned. The values returned will prompt the user to select the property and role they would like to use to access the Workspeed product. Based on the selection, attributes will be presented to the user during their session. Users will have the ability to switch their User Role Category during a session.

5.2 User Role Category and Attribute Relationships

The user role category gives our product the ability to recognize different types of users and present the correct attribute set. User Role Categories are defined and configured during the initial implementation, based on the property and entity organization, along with the authorization rules.

Processes and functions performed using the Workspeed product, are defined by a set of activities. For example, creating and sending a service request to Property Management, is a process or a series of activities (including creating and authorizing the request) that need to be completed. As stated above, each user of the Workspeed system will be assigned a User Role Category. The User Role Category will have a set of attributes mapped to it, that define the capabilities that a given user in this category can perform. For example, an attribute for the Tenant User Role Categories will be "Authorize Service Requests less than $1000.00". For a tenant to authorize service request that cost

less than $1000.00, they will need to have this attribute. In other words, the execution of each activity or process in Workspeed will require that a user's User Role Category contain the particular attributes related to that activity.

Each attribute has a name and a value. In the example above, the attribute name is "Authorize Service Request Below a Certain Cost Value", and it's value is "<$1000.00" . During product development, the Workspeed R&D Team will define the entire list of attributes for the product, and assign them to the various User Role Categories as determined by the needs, responsibilities, and abilities of users in the categories. In turn, these attributes will define the user interface experience, and system functions that the user is allowed to execute.

User Role Category

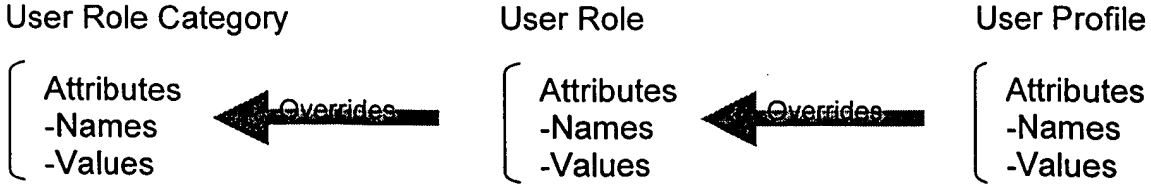
- Attributes
  - -Names
  - -Values

Business Scenario Example:
Cindy is the tenant office manager for ABC Consulting, a tenant at 50 California. The Entity Role Category for Cindy is Tenant, and her User Role Category is 600Mad_Ten_UR_1, showing that she is the tenant office manager. One of Cindy's responsibilities is approving service requests initiated by tenant employees of ABC. Cindy is authorized to approve service requests that cost up to $1000.00. In order to accomplish this task, the "Authorize Service Requests less than $1000.00" attribute must be mapped to her User Role Profile (600Mad_Ten_UR_1).

Attribute Customization
If the users that belong to a certain User Role Category at a specific property location, or if a specific user on the system at a specific property location requires specialized attributes, the Workspeed Professional Services Team (WPST) will be able customize the attribute set mapped to their User Role Category. *(In the database notation, a certain User Role Category at a specific property location is defined as* ***User Role****. The profile for a specific user on the system at a specific property location is defined as the* ***User Profile****.)*

Example
From research performed during product development, the Workspeed R&D Team has determined that a reasonable value for the "Authorize Service Requests Below a Certain Cost Value" attribute, for the tenant office mangers User Role Category (TN_UserRole_A), is $1000.00. However, during the implementation at 600 Madison, it is discovered that tenant office managers need the ability to approve service requests that cost less than $2000.00. To meet this requirement, the WPST would modify the set of attributes for tenant office managers at 600 Madison. Specifically, they would change the "Authorize Service Request Below a Certain Cost Value" attribute value to "<$2000.00". Since the *User Role* set of attributes for tenant office managers at 600 Madison has been modified, they will override the original set of attributes defined for the general tenant office manager User Role Category.

In an extension of the above example, it is further discovered that a particular tenant office manager, Sarah, needs the ability to authorize service requests that cost less than $3000.00. To meet this requirement, the WPST would modify the set of attributes for this particular tenant office manager user at 600 Madison. Specifically, they would change the "Authorize Service Request Below a Certain Cost Value" attribute value to "<$3000.00". Since the *User Profile* set of attributes for this particular tenant office manager at 600 Madison has been modified, it will override the previously modified *User Role* set of attributes, **and** the original set of attributes defined for the general tenant office manager User Role Category.



In summary:

- The Workspeed R&D Team will define and map a set of attributes for each User Role Category for each Entity Role
- The Workspeed Professional Services Team will be able to modify the set of attributes for a the User Role Category at a specific property installation (*User Role*), if required
- The Workspeed Professional Services Team will be able to modify the set of attributes for a specific user, who is a member of a User Role Category, at a specific property installation (*User Profile*), if required
- The attribute set mapped to the *User Role* overrides the attribute set of the User Role Category.
- The attribute set mapped to the *User Profile* overrides the attribute set of the *User Role* and the User Role Category
- A single user can have different entity roles at the same property
- A single user cannot have multiples of the same entity role at the same property.
- A single user can have the same entity role, and the same user role category at different properties with the same or different attributes
- A single user cannot have different user role categories for the same entity role for multiple properties. If the user needs different functionality at the different properties, then the attribute to user role category mapping can be customized on an exception basis.

Please see the following table for several examples of this grouping and mapping process.

User name	Property	Entity	Entity Role Category	User Role Category	Attributes
MaricaM	600 Madison	Rubenco	Property Manager	PM_User_Role_A	Attribute Set 1
MaricaM	1 Dag	Rubenco	Property Manager	PM_User_Role_A	Attribute Set 1
RichardR	600 Madison	Rubenco	Owner	OW_User_Role_A	Attribute Set 2
MaricaM	600 Madison	Rubenco	Tenant	TN_User_Role_B	Attribute Set 3
CamachoM	1000 Fifth Avenue	Newark	Property Manager	PM_User_Role_A	Attribute Set 4

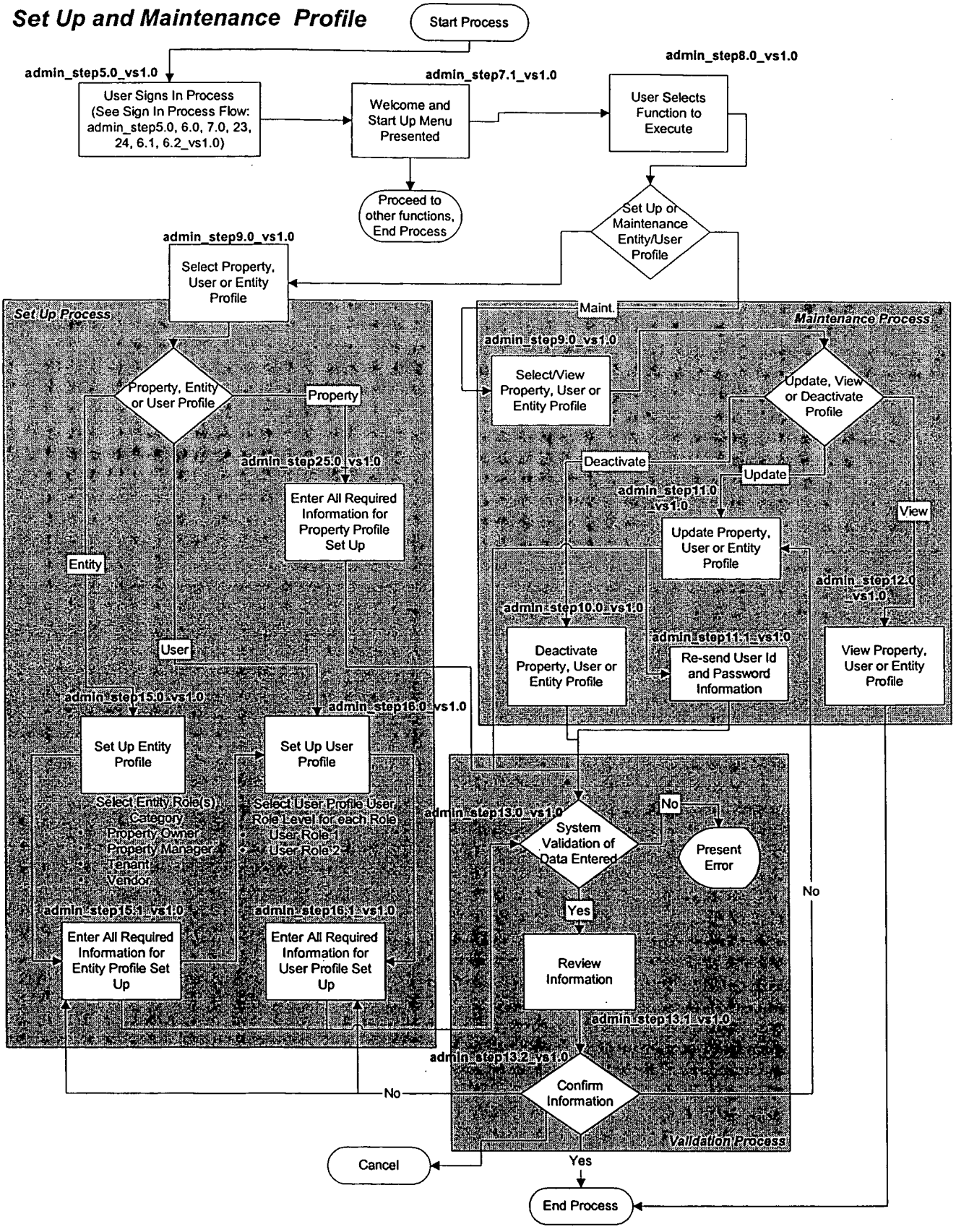
In version 1.0, the user role categories and associated sets of attributes available, will be pre-configured. As stated above, a user can have their user role category modified by the Workspeed Professional Services team. In later versions of the product, we would like the user to be able to customize the attributes associated to a user role category. This would provide greater levels of flexibility for different types of users and their responsibilities.

6 Key Process Flows

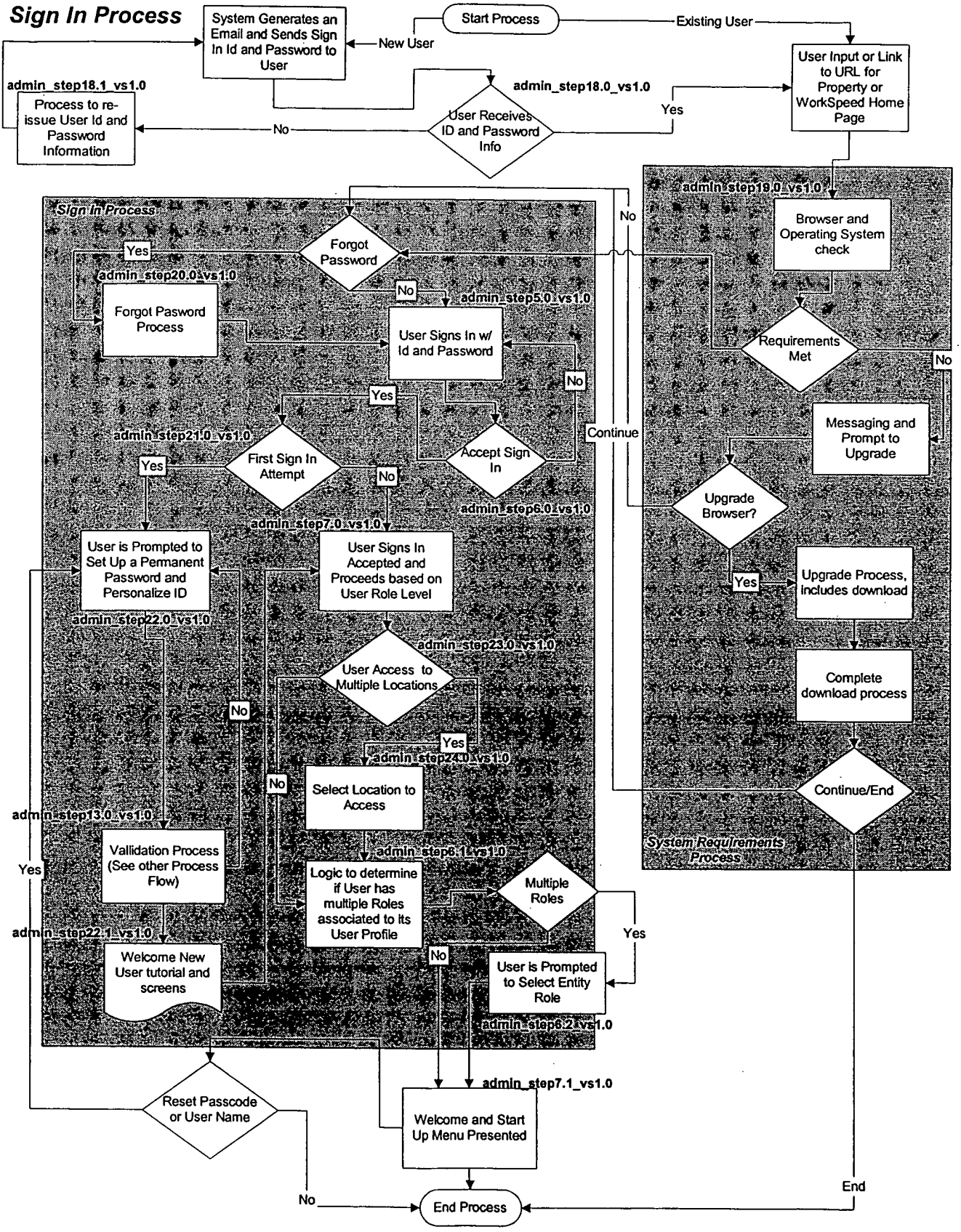
The following process flows illustrate key functionality included in Version 1:

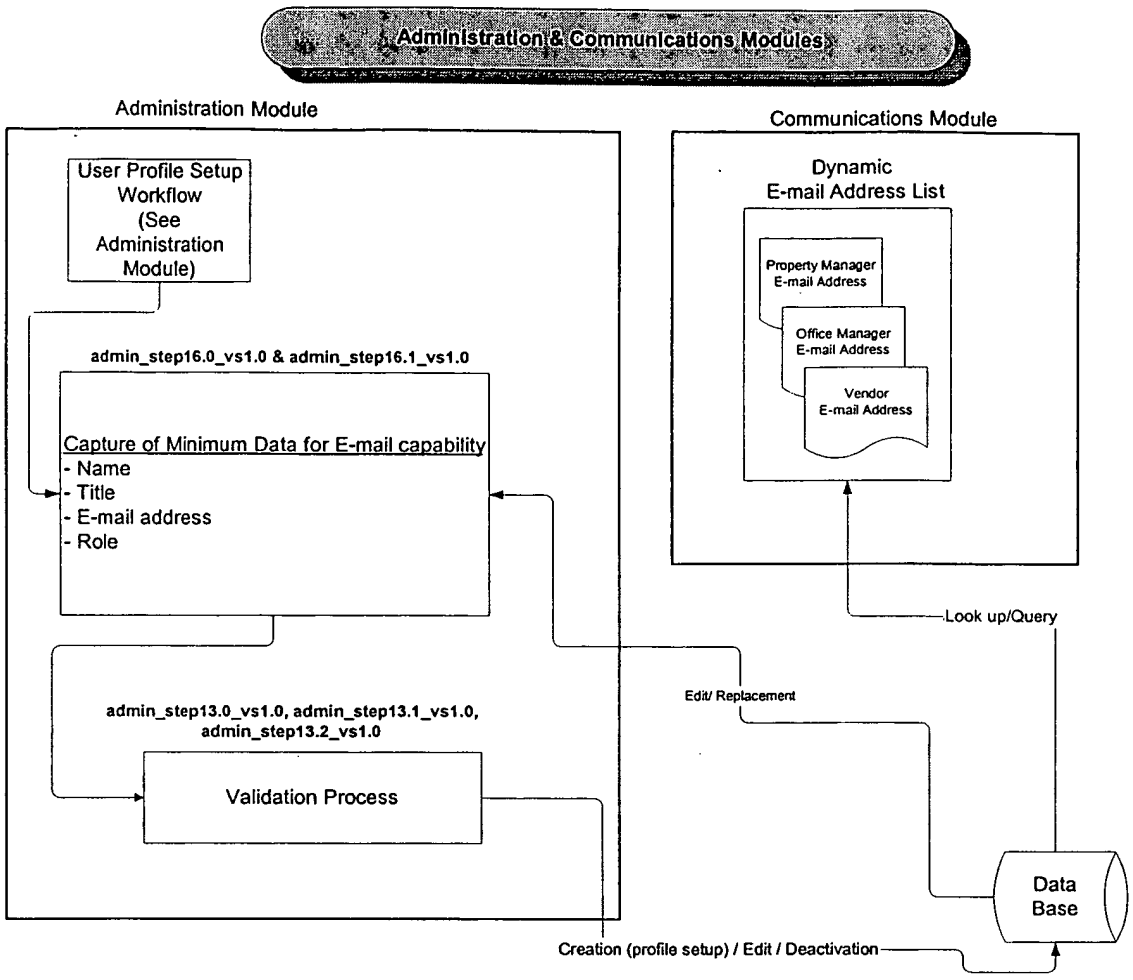
- Set up and Maintain Profile
- Sign In
- Administration & Communications Modules
- Administration and Building Information Modules
- Building Information Management

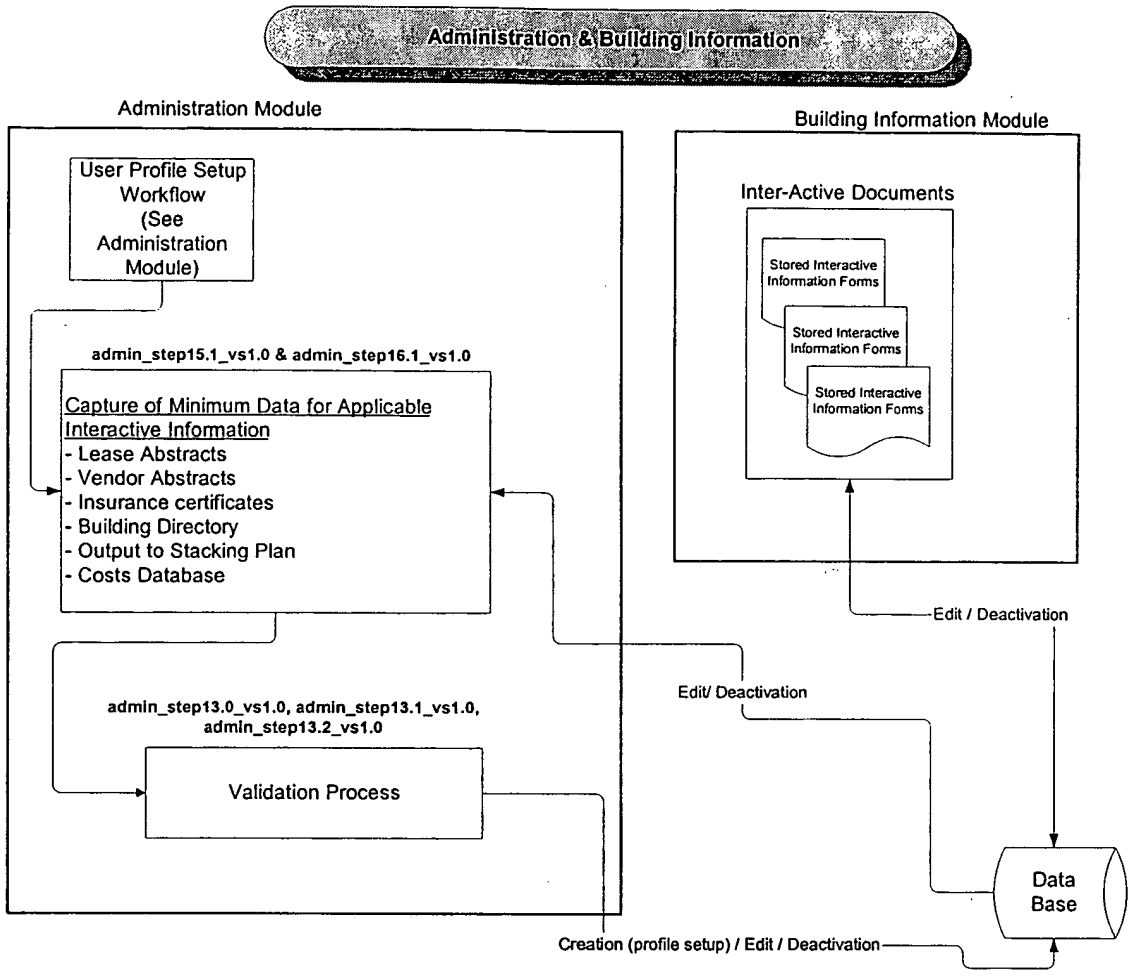
Set Up and Maintenance Profile



Sign In Process




Administration & Communications Modules
Administration Module
Communications Module
User Profile Setup Workflow (See Administration Module)
Dynamic E-mail Address List
Property Manager E-mail Address
Office Manager E-mail Address
Vendor E-mail Address
admin_step16.0_vs1.0 & admin_step16.1_vs1.0
Capture of Minimum Data for E-mail capability
- Name
- Title
- E-mail address
- Role
Look up/Query
Edit/ Replacement
admin_step13.0_vs1.0, admin_step13.1_vs1.0, admin_step13.2_vs1.0
Validation Process
Data Base
Creation (profile setup) / Edit / Deactivation


Administration & Building Information
Administration Module
Building Information Module
User Profile Setup Workflow (See Administration Module)
Inter-Active Documents
Stored Interactive Information Forms
Stored Interactive Information Forms
Stored Interactive Information Forms
admin_step15.1_vs1.0 & admin_step16.1_vs1.0
Capture of Minimum Data for Applicable Interactive Information
- Lease Abstracts
- Vendor Abstracts
- Insurance certificates
- Building Directory
- Output to Stacking Plan
- Costs Database
Edit / Deactivation
Edit/ Deactivation
admin_step13.0_vs1.0, admin_step13.1_vs1.0, admin_step13.2_vs1.0
Validation Process
Data Base
Creation (profile setup) / Edit / Deactivation

7 Additional Features to be Incorporated in Later Releases

Version 1 is scheduled for Beta testing beginning August 1, 2000 with the Administration and Service Request modules. The other V1 modules will follow as they are completed, with the Building Portal module scheduled for implementation on September 15, 2000.

Additional features/functionality will be added over time, based on customer needs and revenue opportunities. However, a "Building Operations" module will likely be implemented in the near term. Originally envisioned for Version 1, these features/functions required more development effort and were removed from the initial release.

7.1 Building Operations

The objective of the Building Operations module is to benefit the Property Management user constituency, by providing a centralized, easy to use process that coordinates and automates the tasks surrounding the maintenance and monitoring activities for the property. The Building Operations module will serve as a hub for coordinating:

- Building Preventative Maintenance activities
  - These are scheduled, recurring activities, that are required to maintain the physical building, including it's facilities, equipment, grounds, amenities, and systems. The workflow and physical tasks required to execute these activities mirror those of standard service requests, except for the initiation process. While a standard service request is initiated by a Workspeed user, preventative maintenance activities are triggered by a prompt from a Preventative Maintenance Activity Profile. These profiles, setup by the property management staff (most likely the Chief Engineer), define the maintenance activity, the individual responsible for performing the activity, the time that the activity should be performed, the frequency of execution, and the prompting method.

- Building Monitoring activities
  - Monitoring activities are similar to the preventative maintenance activities, except that that equipment and meter readings are monitored and recorded, instead of maintenance activities being executed.

- Automated logs to track property management personnel activities, equipment status, Fire Warden items, violations, etc.
  - The fire wardens' login feature is particularly unique and may warrant special attention in the patent application. This feature could be considered a way to increase security (utilizing electronic signatures), and could provide remote access to the login (from anywhere in the building and from the Fire Dept premises). It could also provide the ability to receive additional flash information (beacon), and potentially check at regular intervals a users presence in front of a computer. If we were to develop something like this, the patent could be about a new, on-line security system that might include other elements from the repository as well.

- Automated updates to the building security system regarding changes in building residents
  - BACKGROUND: Frequently the list of authorized people who have access to a building gets out of date. Periodically, a building may cancel and reissue all badges in order to get the list updated. This is both inconvenient to the tenants and costly to the owner.
  - FEATURE: Create an automated *tenant log* that can be compared to the security roster. Over time this could be seamlessly integrated into the building security system.
  - FEATURE: Build a confirmation step from security to the tenant office manger to check on expiring building passes to see if they're still valid– if no confirmation, security will cancel the passes.
  - KEY BENEFIT: Reduces hassle for tenants, reduces cost for owner.

- Automated vacancy credit notification and report
    - BACKGROUND: Owners enter into a contract with a cleaning company to clean the whole building (@ approx. $2/foot). The cleaning company and owner sign a contract, and provide a cleaning spec. The contract has a vacancy credit meaning the building gets money back for spaces not cleaned (e.g. when a tenant moves out).
    - FEATURE: Setup an automatic way to let the cleaning company know when tenants are leaving the building (potentially 30 days advance notice). This way the cleaning company cannot come back and say they weren't told about the vacancy. The system should also create and potentially send a vacancy credit report each month to the owner, property manager and vendor.
    - KEY BENEFIT: This feature will help maximize revenue for the owner by ensuring that the appropriate monthly vacancy credit is applied.

- Automated insurance certificate expiration tracking and reminders
    - BACKGROUND: Insurance certificates must be maintained for all tenants and vendors who come into the building. These certificates are required before vendors can proceed with a job and before tenants can move into a building. Keeping track of the certificates can be a difficult task in a large office building and yet it is vital from a risk perspective that all certificates are up to date.
    - FEATURE: Set up a log /reminder feature to track each tenant and vendor's insurance certificate.
    - KEY BENEFIT: Makes life easier for the property manager. Helps reduce the risk of having a tenant or vendor working in the building without a valid insurance certificate.

- Online stacking plan

- Valet Parking System

    - This could be a parking system where the valet would use a Wireless Access Protocol (WAP)-based solution to signal the storage of a car (car # and spot #), then retrieve its location on request and finally signal availability, based on the repository mapping cars and tenant employees. Such a system, allowing for a better management of spots, keys, etc. might be innovative enough to be patented.

FILE NO.: 3188/1H005-us1

DECLARATION
AND POWER OF ATTORNEY
Original Application

As a below named inventor, I declare that the information given herein is true, that I believe that I am the original, first and sole inventor if only one name is listed at 1 below, or a joint inventor if plural inventors are named below, of the invention entitled:

METHOD OF MANAGING REAL ESTATE

which is described and claimed in:

[x] the attached specification or

[] the specification in application Serial No. , filed
(for declaration not accompanying appl.)

that I do not know and do not believe that the same was ever known or used in the United States of America before my or our invention thereof or patented or described in any printed publication in any country before my or our invention thereof, or more than one year prior to this application, or in public use or on sale in the United States of America more than one year prior to this application, that the invention has not been patented or made the subject of an inventor's certificate issued before the date of this application in any country foreign to the United States of America on an application filed by me or my legal representatives or assigns more than twelve months prior to this application, that I acknowledge my duty to disclose information of which I am aware which is material to patentability in accordance with 37 CFR §1.56. I hereby state that I have reviewed and understand the contents of the above-identified specification, including the claims, as amended by any amendment referred to above.

I hereby claim the priority benefits under 35 U.S.C. 119 of any application(s) for patent or inventor's certificate listed below. All foreign applications for patent or inventor's certificate on this invention filed by me or my legal representatives or assigns prior to the application(s) of which priority is claimed are also identified below.

PRIOR APPLICATION(S), IF ANY, OF WHICH PRIORITY IS CLAIMED

COUNTRY	APPLICATION NO.	DATE OF FILING
United States	60/221,652	July 28, 2000

ALL FOREIGN APPLICATIONS, IF ANY, FILED PRIOR TO THE APPLICATION(S) OF WHICH PRIORITY IS CLAIMED

COUNTRY	APPLICATION NO.	DATE OF FILING

POWER OF ATTORNEY:

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I further declare that all statements made herein of my own knowledge are true and that all statements made on information and belief are believed to be true; and further that these statements were made with the knowledge that willful false statements and the like so made are punishable by fine or imprisonment, or both, under Section 1001 of Title 18 of the United States Code, and that such willful false statements may jeopardize the validity of the application or any patent issuing thereon.

SIGNATURE OF INVENTOR 1: _____ DATED: 10/17/00
RICHARD RUBEN

SIGNATURE OF INVENTOR 2: _____ DATED: _____

SIGNATURE OF INVENTOR 3: _____ DATED: _____

(D&DForms/PTO-21)

REV. 12/87

I further declare that all statements made herein of my own knowledge are true and that all statements made on information and belief are believed to be true; and further that these statements were made with the knowledge that willful false statements and the like so made are punishable by fine or imprisonment, or both, under Section 1001 of Title 18 of the United States Code, and that such willful false statements may jeopardize the validity of the application or any patent issuing thereon.

SIGNATURE OF INVENTOR 1: _____ DATED: _____

SIGNATURE OF INVENTOR 2: _____ DATED: _____

SIGNATURE OF INVENTOR 3: _____ DATED: 10/22/00

ERIC MONTEIL

ERIC MONTEIL

(D&DForms/PTO-21)

REV. 12/87

Workspeed Version 1 Overview
- For Patent Application -

Project name	Workspeed Version 1.0
Version	1
Document Type	Overview Document to support the Workspeed patent application
Scope	All modules for Version 1.0
Audience	Gordon D Coplein, Esq. Bruce Deming, VP & Corporate Counsel

1 Revision History

#	Date	Who	Changes
1	6-4-00	Melissa Gregson	• Initial Version
2			•
3			•
4			•
5			•
6			•
7			•

2 Table of Contents

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3 Overview

Workspeed is building a web based workflow application service to help automate and facilitate processes and communications for large scale commercial office buildings. Property owners, property managers/building staff, tenant office managers and vendors will use the system.

The WorkSpeed product will be:

1) a simple and intuitive interface enabling enhancement of the workflow and communication processes between owners, tenants, property management and vendors

2) a secure and scalable web-based application allowing for different levels of customization and personalization.

To help define the scope of the initial design, the following list identifies key functionality proposed for Version 1. These functions are grouped into logical modules to facilitate rapid development, (e.g. each module can be worked on independently and handed off between specifications, ui, coding and testing teams).

Module Name	Key Functionality Supported in Version 1
Administration ○ ***Includes functions to set up and maintain properties, entities and users. Also includes processes for user sign in, uploading and management of site content.***	➢ **Initial Property Set Up** includes the actions required to implement the Workspeed product to each property. • **Create a domain for each property location** to support the product, this includes all development/implementation set up activities. • **Establish a property profile** with information specific to the building, including number of floors, suites and associated square footage, etc. • **Establish an entity profile** for the property owner (Individual or Institutional) and the property management company. The entity profile will include specific information about the company. • **Associate property location(s) to each property owner and property management entity profile**. Entities that represent the property ownership and property management may have more than one property operating the Workspeed product. An association between these entities and each location will be made to facilitate access to multiple properties, using the product, along with minimizing redundancy of entity profile information and the process of entity profile set up. • **Create the primary user profile(s) for the property owner and property management entity profiles**. The property owner company and the property management company will have people on their staff enabled to access and interact with the product. Each person with access will have a user profile. See the User Profile Set Up process. • **Configure User Role Categories.** A definition for each entity role will be configured for the property. This information will determine the experience and interaction authority for each user. Information on the Property Owner, Property Management Company and the primary users, for each entity, will be input into the product. These groups will be responsible, initially, for ramping up other entities and users of the product, such as Tenants and Vendors and their

Module Name	Key Functionality Supported in Version 1

	primary users.
	• **The primary user profile, for each entity, will be responsible for creating user profiles for their staff.** Included in the set up of user profiles is the assignment of a user role category.
	
	➢ <u>Ongoing maintenance</u>
	• Processes for uploading and managing new content to the site.
	• Processes for implementing updates to the configuration of the product including:
	  • Create New Entity Profile
	  • Create New User Profile
	  • Update/Edit an Existing Property Profile
	  • Update/Edit an Existing Entity Profile
	  • Update/Edit an Existing User Profile
	  • View an Existing Property Profile
	  • View an Existing Entity Profile
	  • View an Existing User Profile
	  • Deactivate Property Profile
	  • Deactivate Entity Profile
	  • Deactivate User Profile

Service Request
 	
• ***Enables users to initiate service requests using a web-based tool and a standard process***
• ***Facilitates the communication between the user initiating a service request and the user(s) responsible for fulfilling the request by integrating web and wireless technology***
• ***Enhances the overall experience associated with submitting a service request by providing point-in-time status on all requests***
• ***Provides the capability to associate costs and detail information to all service requests initiated and fulfilled within a property***
	• ***Supported Service Requests and Associated Functionality***
	  • See matrix, Section 4.
	
	• ***Create or Update a Service Request*** using the Workspeed product. Actions that initiate a service request, including any updates to existing service requests, ability to view or print a service request, cancel an existing request and access completed/archived service requests. Preventative Maintenance requests (scheduled), Includes Ad Hoc service request, (requests created by the property engineering staff).
	  • Create a Service Request
	  • Update an existing Service Request
	  o Add additional information to an existing Service Request
	  o Update the status or information specific to the completion of a Service Request
	  o Cancel an existing Service Request
	  • View or Print a Service Request
	  o Existing Service Request
	  o Closed Service Request
	  • Authorize a new Service Request
	  • Request additional information on a Service Request
	  • Delegate a Service Request (within Property Mgmt group)
	  o Sign Off on a Service Request
	
	• ***Fulfillment Workflow*** includes all the actions within the Workspeed product once a service request has been created or

Module Name	Key Functionality Supported in Version 1
	updated. The routing/assignment of a service request to the appropriate individuals for authorization and completion of actions required to fulfill the request. o Includes the business rules and routing logic for the requestor to the users completing the request. o These are sub components of the Workflow process. Depending on the variability of the request, some actions associated to sub components of the workflow process may be skipped. The defined business rules will drive these processes. The integration of other communication tools to support the completion of a service request and meet the primary objectives of the Workspeed service request process include the use of email, wireless devices and potentially other tools that can be used to supplement the overall process. • ***Actions and Processes Completed Outside*** the Workspeed product. In version 1.0, some actions required to accurately complete a service request will need to be completed using "as is" processes. These outside processes include the ability to associate costs to a service request, purchase ordering, request for proposal and work authorizations.
Communications o ***Includes announcement and messaging functions to facilitate communication between different users of the Workspeed product.***	• **Announcements.** This feature allows property managers and owners the ability to "publish" a public announcement to all users of the Workspeed product at a specific property location. A one to two line announcement summary will appear on key screens of the user interface. Users can then click to access detailed information provided in the announcement. Specific functionality for the announcement feature includes: o Viewing, Creating, Saving Draft, Deleting Draft, Publishing, Expiring, Filing and Publishing via email. • **Messages.** This feature allows Workspeed users the ability to create, send and track messages to other Workspeed users and/or to individuals and companies who do not use Workspeed. Specific functionality for messaging includes: • Creating • Viewing • Sending • Deleting • Saving Draft • Audit Trail • Categorizing • Ability to use dynamically created address lists from the Workspeed system, based on the users role category • In addition to the above features, all Workspeed participants can add, edit, and delete private e-mail addresses.
Customer Service • ***Includes functions to facilitate communication***	The Workspeed product is a web-based system that will evolve over time to meet the needs •

Module Name	Key Functionality Supported in Version 1
with the Workspeed Product Support team and the ability for all users to provide feedback on the Workspeed product.	• **Messaging to/from Workspeed Customer Service** • **User Feedback tracking, analysis and reporting.**
Building Information • ***Serves as a repository and access mechanism for information relating to a building, its owner, management, tenants, vendors, and operations. Some of the information is "public" and accessible to anyone who visits the site, while other information is "private" and accessible only to those Workspeed users who sign into the system and have the appropriate user role category.***	• **Static Documents** – These are electronic documents that are not modifiable directly in the Workspeed system, but can be created or updated directly in their native applications. Any pertinent hard copy documents will be converted to electronic format, and stored in the system as PDF, MS Word documents, or any other applicable format. Users will be able to access various documents for viewing, and uploading new or edited versions, depending on their user role category. • The static documents processed by the system are: building policies & procedures, construction rules and regulations, emergency procedures, cleaning specifications, leases, vendor contracts, schedule of contracts, tenant office policies & procedures, employee directories, tenant CAD drawings, contact lists, and life safety designations. **Interactive Information** – These are forms that contain active fields from which data may be used in the system processes. These key data fields are captured during entity profile setup in the Administration module. This key data is associated to business entities with in the system, and is accessible based on the user entity role and user role level. Data contained in these fields: • Can direct and provide information to service request workflows and other parts of the system (e.g. pre-populating fields and choices to help simplify the user experience). • May contain values to be used in fee/accounting calculations • Can be analyzed and categorized for use in reports • The interactive information processed by the system are: lease abstracts, vendor service contract abstracts, property management abstracts, insurance certificates, building directories, employee directories, and stacking plan data. Specific functionality to support building information includes: • <u>Document Creation</u> o Create Interactive Information o Upload Static Documents • <u>Document Viewing / Printing / Searching</u> • <u>Document Updating / Editing / Detaching</u> o Update/Edit Interactive Information o Upload (updated) Static Documents

Module Name	Key Functionality Supported in Version 1
	○ Deactivate Interactive Information ○ Unload Static documents ○ Archive Old Documents (interactive and static)
Reporting • ***Includes functions to capture and summarize current and historical data from the product.***	• Version 1 will include up to approximately ten pre-configured and printable reports. Reports will be developed to meet the needs of the following user segments: ○ Owners ○ Property Managers ○ Workspeed Business Development
Building Portal • ***Commerce - This will be the framework to allow users access to goods and services provided by Workspeed e-commerce partners.*** • ***Content - Relevant content targeted to the various customer segments to help increase traffic and commerce on the Workspeed site.*** • ***Community - Features enabling open communication forums between users, such as interactive bulletin boards.***	The needs, wants and preferences of each primary Workspeed customer segment are diverse. By creating different "portal" views we will be able to make each user's experience more relevant to them. • Tenant office managers are prime candidates for e-commerce opportunities. Initial research has shown that this segment will be more likely to participate in online commerce at Workspeed if provided customized content and community features. Also, this segment will use the workflow application much less and consequently the portal will be more important to them. The Version 1 feature set to support the office manager portal includes: • **Commerce** Targeted to products and services highly relevant to tenant office managers. • **Content** Initial content topics for the office manager segment include: Buyers Guides, Feature Articles, Newsletters, Quick Tips, Advice Column and an Information Directory. • **Community** Initial bulletin boards will focus on the office manager customer segment. • All other Workspeed Modules will be included, but less prominent in this view. • Property management staff are more focused on the Workspeed application itself. They will use the Workspeed system as an integral tool to do their job. Consequently, their portal view will predominately feature the service request, communication, admin, building info and reporting modules. • Owners are primarily interested in aggregated views of their building(s) and the impacts on operating costs and revenues. Therefore their portal view will mainly be focused on summarized information on the service request module and on the reporting module. All other Workspeed Modules will be included, but less prominent in this view.

4 Service Request Types

Type of Service Request	Service Request Description	Immediate Request	Shared Resource Request
1. Lighting	Repair, adjustment or replacement of lighting fixtures or associated parts/materials	X	
2. Comfort (Heat/Cool)	Temperature adjustment to specific areas of the building	X	
3. Freight Elevator	Reserve the freight elevator		X
4. Building Conference Center	Reserve conference center space		X
5. Loading Dock	Reserve loading dock space		X
6. HVAC OT	Designate time for air conditioning after normal business hours		
7. Electrical	Repair, adjustment or replacement of electrical parts/materials	X	
8. Janitorial/Extra Cleaning	Specified cleaning other than scheduled cleaning service	X	
9. Trash / Rubbish	Removal and/or disposal of trash other than scheduled pick up	X	
10. Plumbing	Repair or replacement of plumbing parts/materials	X	
11. Doors / Equipment	Install, repair, adjustment or replacement of building doors or building equipment	X	
12. Security	New/cancelled security passes or specified security need	X	
13. Restroom supplies	Repair or replacement of restroom supplies and/or equipment	X	
14. Valet Parking	Car retrieval or specified need associated to building parking	X	
15. Elevator Breakdown	Repair of elevator equipment	X	
16. General Repair /Maintenance	Repair and maintenance requests that fall outside of the specified SR types	X	
17. Preventative Maintenance	Recurring activities required for the maintenance of the building. (Weekly, Monthly, Annually, etc.)	Recurring	
18. Other	All other requests that fall outside of the specified types	X	

5 Property/Entity/Entity Role Category and User Role Category Definition

It is important to understand the hierarchy of information within the Workspeed product. The hierarchy of information drives how associations are recognized and ensures consistency among the various layers of information throughout the system. The hierarchy is ultimately responsible for access and interaction rights in supporting the product functionality.

The Hierarchy:
Within each Workspeed property there are many different business entities interacting with each other. Tenants communicate and make requests with Property Management, Vendors who support the building in various capacities and Owners who require the best possible operating model for the property to ensure occupancy and efficiency. These are just a few examples. However, it is important to understand how information is associated and categorized within the product. See the diagram below for an overview of the hierarchy and reference the following content for a definition of the hierarchy components.

Hierarchy Rules

An Entity must be associated to a Property

Property to Entity is a One to Many relationship

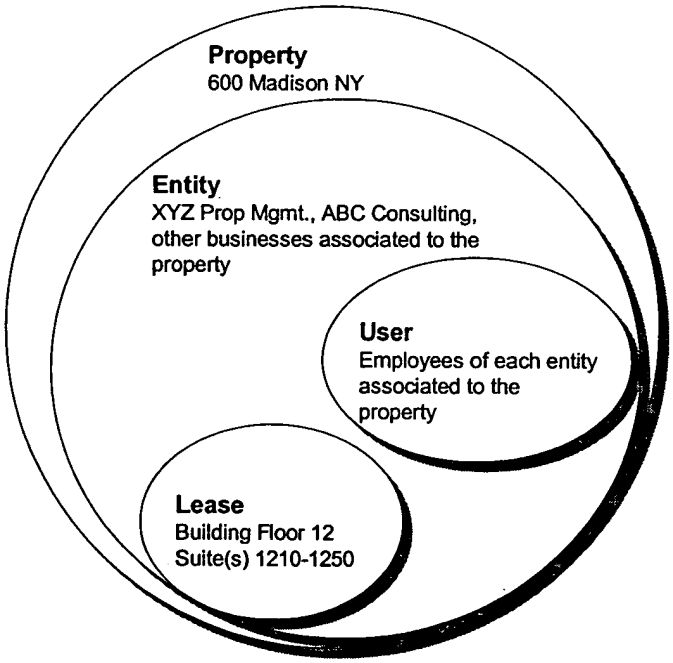
Each entity is categorized into a Role (Property Owner, Property Management, Tenant and Vendor)

A Lease is associated to space within the property
A Lease is associated to one tenant entity
A Lease is associated to one property ownership entity
A Lease is associated to one property management entity
Entity to Lease is a one to many relationship

Each User must be associated to an Entity

Entity to User is a One to Many relationship

Each User is assigned a privilege level



Property:
A ***Property*** represents the physical location of a commercial office building where business entities conduct their day-to-day business operations. Within the Workspeed design, a property also represents the web site supporting the version 1.0 functions, for example: 600Madision.com

Entity:
An ***Entity*** represents a business organization with employees who either work in the property or interact with other organizations and/or people in the property. Examples of entities include: Tenants who lease office space in a

property, the company that manages the property, various vendors who support the property, and the individual or institutional ownership of the property itself.

Entity Role Category:
Business entities that interact with a property have been categorized into six different roles. The ***Entity Role Category*** represents a single entity or group of entities with common attributes, interaction and experience within the Workspeed product. The role is an important component in determining the attributes the user is enabled to perform. For example: The Property Ownership entity (Property Owner Role) and its associated employees (users) will not have the same attributes and views available as the employees (users) associated to a cleaning company (Vendor Role).

The following table provides an example of the different entity role categories supported in the product. Each entity must be categorized by a role.

Entity Role Category	Example
System Administration	Workspeed Inc.
Property Owner	Lawrence Ruben, Shorenstein
Property Management	XYZ Management Co.
Tenant	Partech, ABC Consulting, BankAmerica
Vendor	Bay City Cleaning Services
Lease	National Guarantor Bank, Prudential Insurance

User:
Within each entity, there will be multiple users. A ***User*** is person who works for an entity that interacts with the property. Users will sign in with an id and a password and perform various functions supported in the Workspeed product. For example: ABC Consulting leases office space in the property (600 Madison). Cindy is an employee of ABC Consulting and will be enabled to sign into the product and have access to set of attributes. Cindy represents a user of the Workspeed product.

Lease:
A ***Lease*** represents a section of space within a property. Typically defined by building floor(s) and associated suite(s). The lease will contain the terms of the space such as rate and square footage. The lease and its associated space will be contracted to one tenant entity. A lease may have sub tenants entities associated as well.

Space:
The ***Space*** is an object that represents the tenant and management accessible areas of a property. These spaces could be suites, floors, elevators, common conference rooms, gyms, loading docs, bathrooms, hallways, lobbies, etc. The space concept is used to direct service request workflows, and to assign management and ownership responsibilities to the various property management and ownership entities related to the property.

5.1 User Role Category

Each User of the Workspeed product will have access to a set of defined attributes based on their Entity Role Category. However, there is an additional layer within the Entity Role Category of each entity that determines the specific authorization levels and attributes associated to each User. Each user will have a ***User Role Category*** assigned. The user role category will define which group(s) of attributes the user can access. The incorporation of user role category enables the ability to drive the workflow processes and other forms of interaction and maintenance of the product, differently for users within the same Entity Role Category. *For example*, the difference in authority and user needs between the Leasing Agent and the Chief Engineer. Both of these users are categorized as the Property Management Entity Role, and in this example they could work for the same Property Management entity. However, within the Workspeed product, these users have different needs and functions to perform. When each user's profile is created, (see Profile Set Up 4.3) a user role category is assigned.

Users are associated to an entity and an entity can be associated to multiple entity role categories. For each entity role that an entity has, the user can have a specified user role category.

For example: R. Ruben is a user for the Property Ownership entity of Lawrence Ruben Inc. Lawrence Ruben Inc. owns the property at 600 Madison. Lawrence Ruben Inc. is also a tenant of the property at 600 Madison. R. Ruben (user profile) is associated to one entity (Lawrence Ruben Inc.) and for each of its roles (Property Owner and Tenant) R. Ruben has an associated user role category.

The table below provides an illustration of the user role category for the various entity roles within a property. This diagram is an example. Once all the functionality associated with the Workspeed product has been fully designed, the user role categories will be assigned sets of attributes.

Role	Example of Entity	User Role Category	Example: Description of User Role Category
Tenant	Tiffanys	600Mad_Ten_UR_1	Office Manager
		600Mad_Ten_UR_2	Office Manager Asst
		600Mad_Ten_UR_3	Tenant Employee
Property Owner	Lawrence Ruben	600Mad_Own_UR_1	Primary Owner Representative
		600Mad_Own_UR_2	Secondary Owner Representative
Property Management	XYZ Management	600Mad_Prop_Mgt_UR_1	Primary Property Manager
		600Mad_Prop_Mgt_UR_2	Property Mgmt. Assistant
		600Mad_Prop_Mgt_UR_3	Chief Engineer
Vendor	Corporate Cleaning Company	600Mad_Ven_UR_1	Manager
		600Mad_Ven_UR_2	Employee
Lease	National Guarantor Bank	600Mad_Lea_UR_1	Guarantor

The user role category derived includes the property location, the role and associated user role. The User Role Category will be associated to the user ID. During sign in/validation of the user ID, all the User Role Categories associated to a user ID will be returned. The values returned will prompt the user to select the property and role they would like to use to access the Workspeed product. Based on the selection, attributes will be presented to the user during their session. Users will have the ability to switch their User Role Category during a session.

5.2 User Role Category and Attribute Relationships

The user role category gives our product the ability to recognize different types of users and present the correct attribute set. User Role Categories are defined and configured during the initial implementation, based on the property and entity organization, along with the authorization rules.

Processes and functions performed using the Workspeed product, are defined by a set of activities. For example, creating and sending a service request to Property Management, is a process or a series of activities (including creating and authorizing the request) that need to be completed. As stated above, each user of the Workspeed system will be assigned a User Role Category. The User Role Category will have a set of attributes mapped to it, that define the capabilities that a given user in this category can perform. For example, an attribute for the Tenant User Role Categories will be "Authorize Service Requests less than $1000.00". For a tenant to authorize service request that cost

less than $1000.00, they will need to have this attribute. In other words, the execution of each activity or process in Workspeed will require that a user's User Role Category contain the particular attributes related to that activity.

Each attribute has a name and a value. In the example above, the attribute name is "Authorize Service Request Below a Certain Cost Value", and it's value is "<$1000.00" . During product development, the Workspeed R&D Team will define the entire list of attributes for the product, and assign them to the various User Role Categories as determined by the needs, responsibilities, and abilities of users in the categories. In turn, these attributes will define the user interface experience, and system functions that the user is allowed to execute.

User Role Category

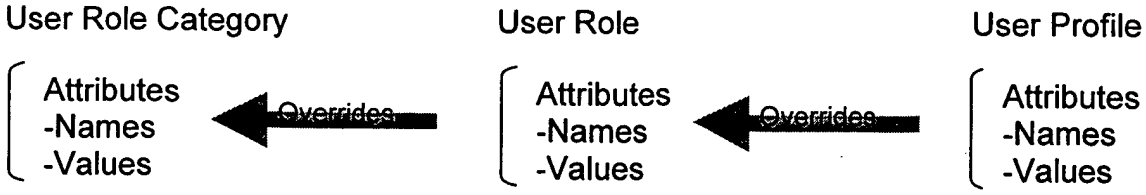
- Attributes
  - -Names
  - -Values

Business Scenario Example:
Cindy is the tenant office manager for ABC Consulting, a tenant at 50 California. The Entity Role Category for Cindy is Tenant, and her User Role Category is 600Mad_Ten_UR_1, showing that she is the tenant office manager. One of Cindy's responsibilities is approving service requests initiated by tenant employees of ABC. Cindy is authorized to approve service requests that cost up to $1000.00. In order to accomplish this task, the "Authorize Service Requests less than $1000.00" attribute must be mapped to her User Role Profile (600Mad_Ten_UR_1).

Attribute Customization
If the users that belong to a certain User Role Category at a specific property location, or if a specific user on the system at a specific property location requires specialized attributes, the Workspeed Professional Services Team (WPST) will be able customize the attribute set mapped to their User Role Category. *(In the database notation, a certain User Role Category at a specific property location is defined as* ***User Role****. The profile for a specific user on the system at a specific property location is defined as the* ***User Profile****.)*

Example
From research performed during product development, the Workspeed R&D Team has determined that a reasonable value for the "Authorize Service Requests Below a Certain Cost Value" attribute, for the tenant office mangers User Role Category (TN_UserRole_A), is $1000.00. However, during the implementation at 600 Madison, it is discovered that tenant office managers need the ability to approve service requests that cost less than $2000.00. To meet this requirement, the WPST would modify the set of attributes for tenant office managers at 600 Madison. Specifically, they would change the "Authorize Service Request Below a Certain Cost Value" attribute value to "<$2000.00". Since the *User Role* set of attributes for tenant office managers at 600 Madison has been modified, they will override the original set of attributes defined for the general tenant office manager User Role Category.

In an extension of the above example, it is further discovered that a particular tenant office manager, Sarah, needs the ability to authorize service requests that cost less than $3000.00. To meet this requirement, the WPST would modify the set of attributes for this particular tenant office manager user at 600 Madison. Specifically, they would change the "Authorize Service Request Below a Certain Cost Value" attribute value to "<$3000.00". Since the *User Profile* set of attributes for this particular tenant office manager at 600 Madison has been modified, it will override the previously modified *User Role* set of attributes, **and** the original set of attributes defined for the general tenant office manager User Role Category.



In summary:

- The Workspeed R&D Team will define and map a set of attributes for each User Role Category for each Entity Role
- The Workspeed Professional Services Team will be able to modify the set of attributes for a the User Role Category at a specific property installation (*User Role*), if required
- The Workspeed Professional Services Team will be able to modify the set of attributes for a specific user, who is a member of a User Role Category, at a specific property installation (*User Profile*), if required
- The attribute set mapped to the *User Role* overrides the attribute set of the User Role Category.
- The attribute set mapped to the *User Profile* overrides the attribute set of the *User Role* and the User Role Category
- A single user can have different entity roles at the same property
- A single user cannot have multiples of the same entity role at the same property.
- A single user can have the same entity role, and the same user role category at different properties with the same or different attributes
- A single user cannot have different user role categories for the same entity role for multiple properties. If the user needs different functionality at the different properties, then the attribute to user role category mapping can be customized on an exception basis.

Please see the following table for several examples of this grouping and mapping process.

User name	Property	Entity	Entity Role Category	User Role Category	Attributes
MaricaM	600 Madison	Rubenco	Property Manager	PM_User_Role_A	Attribute Set 1
MaricaM	1 Dag	Rubenco	Property Manager	PM_User_Role_A	Attribute Set 1
RichardR	600 Madison	Rubenco	Owner	OW_User_Role_A	Attribute Set 2
MaricaM	600 Madison	Rubenco	Tenant	TN_User_Role_B	Attribute Set 3
CamachoM	1000 Fifth Avenue	Newark	Property Manager	PM_User_Role_A	Attribute Set 4

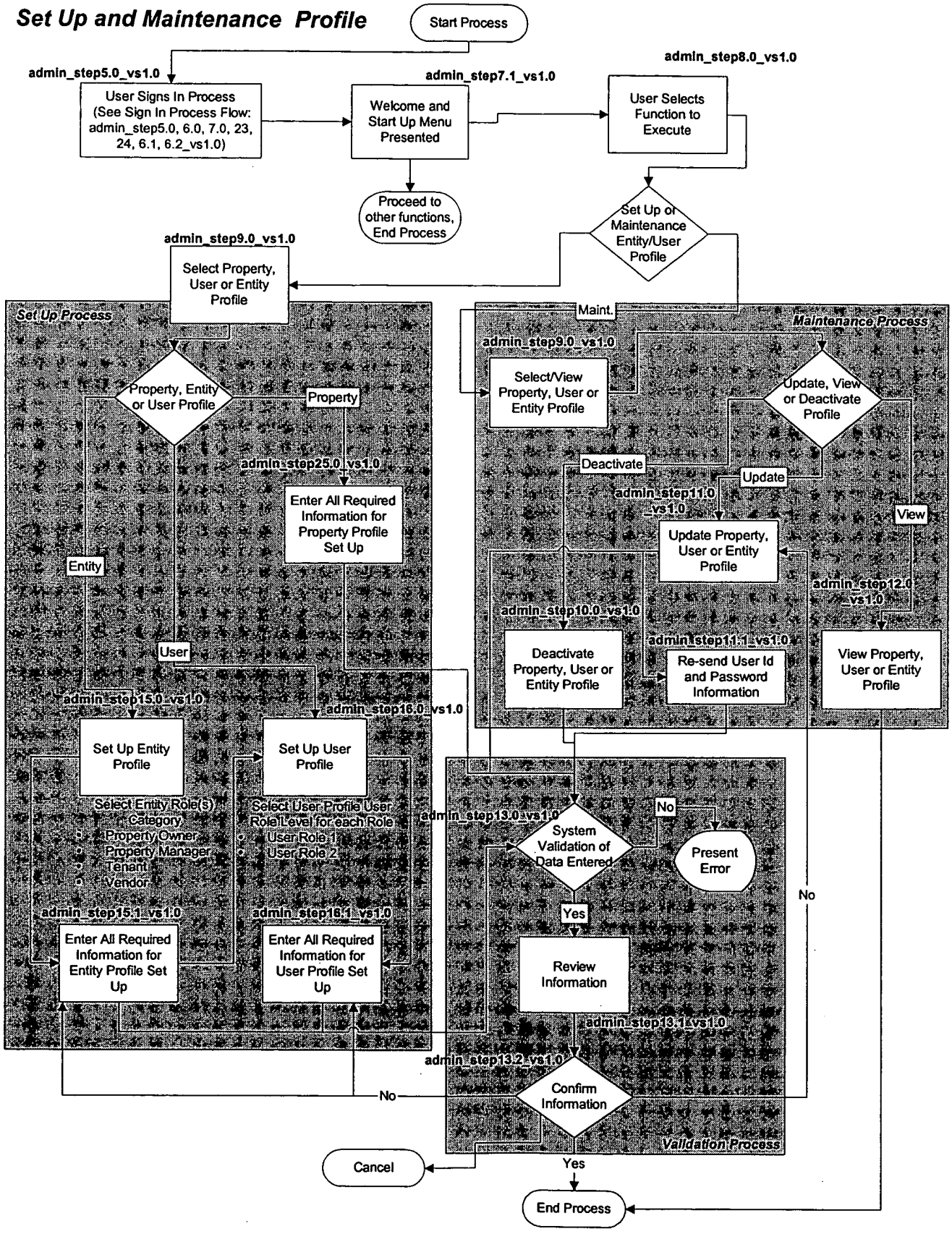
In version 1.0, the user role categories and associated sets of attributes available, will be pre-configured. As stated above, a user can have their user role category modified by the Workspeed Professional Services team. In later versions of the product, we would like the user to be able to customize the attributes associated to a user role category. This would provide greater levels of flexibility for different types of users and their responsibilities.

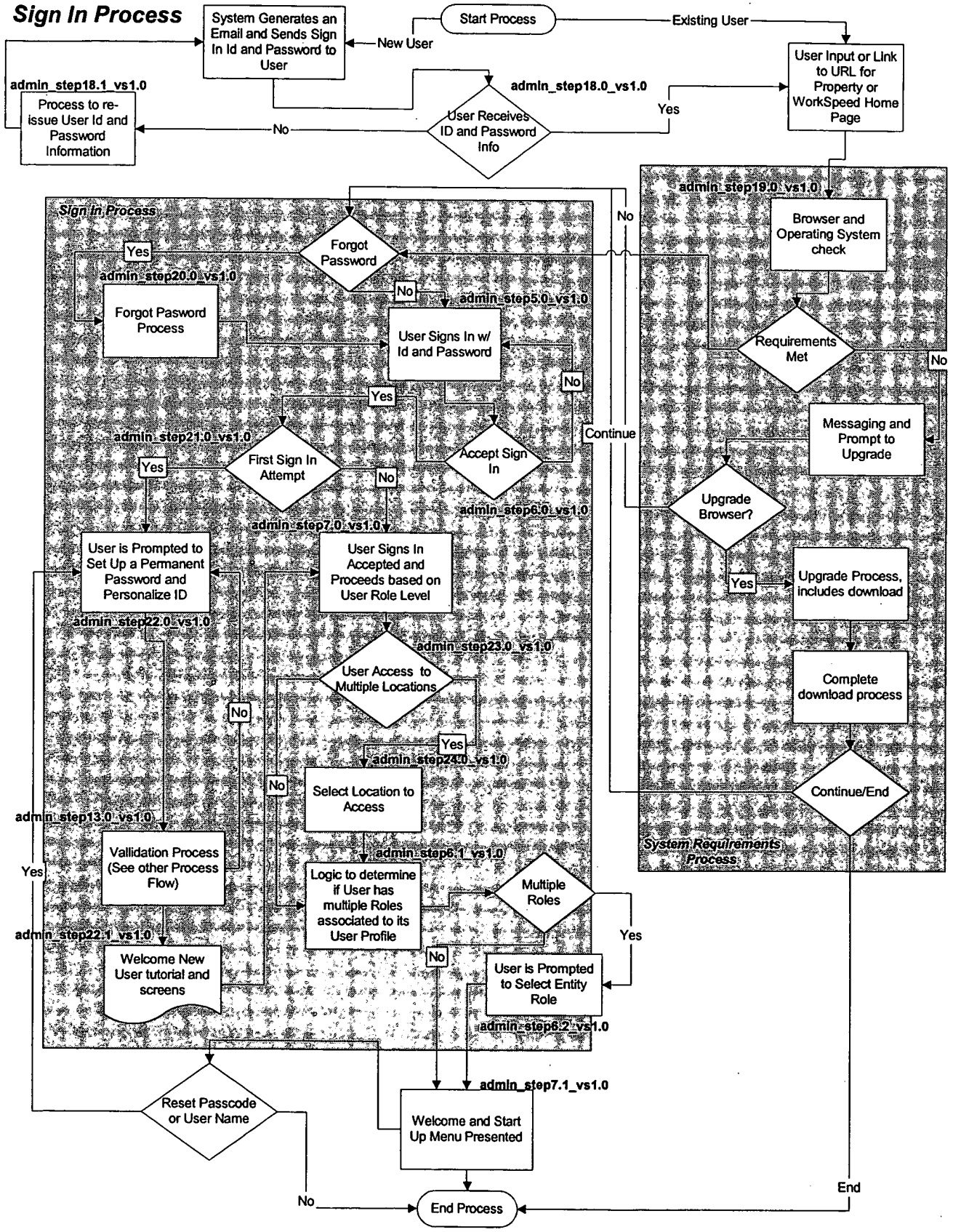
6 Key Process Flows

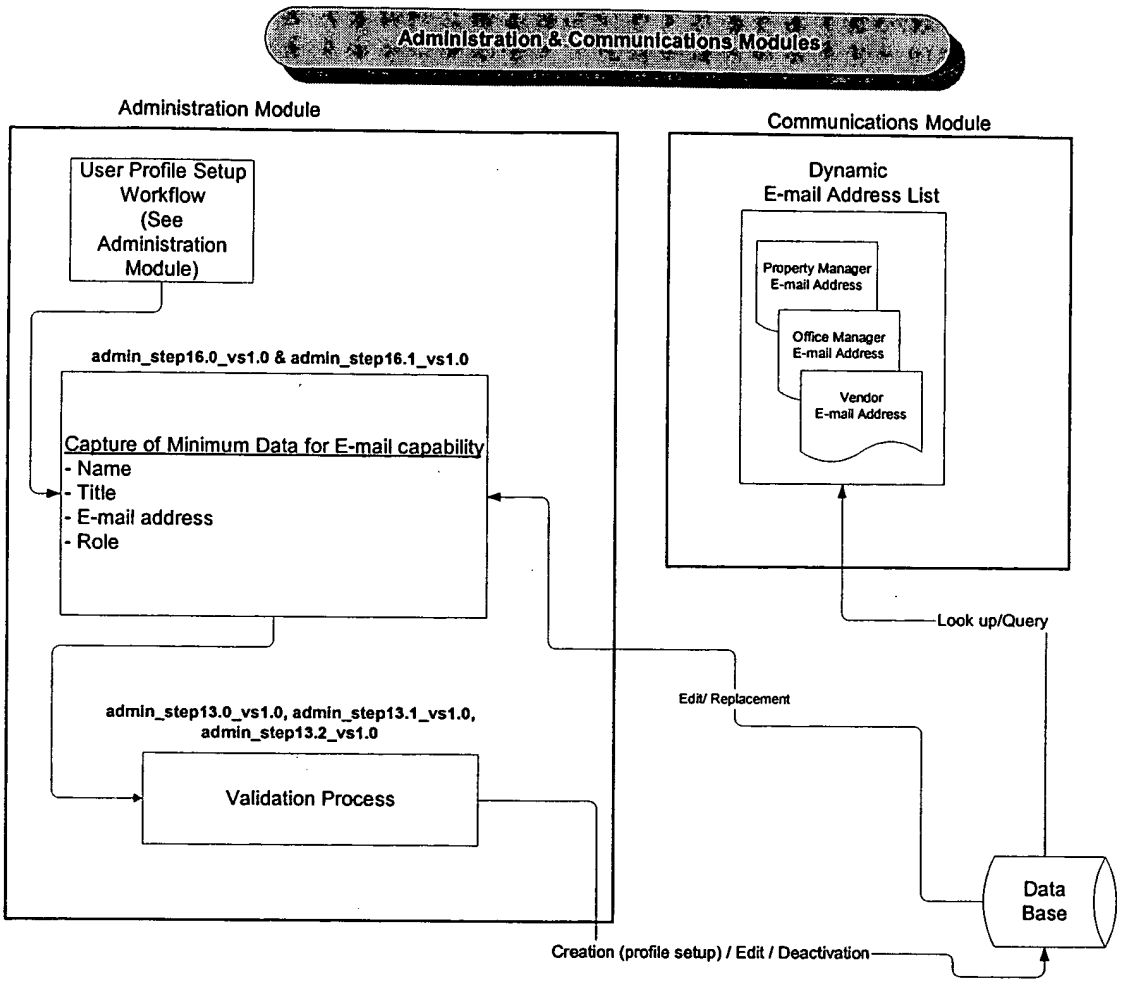
The following process flows illustrate key functionality included in Version 1:

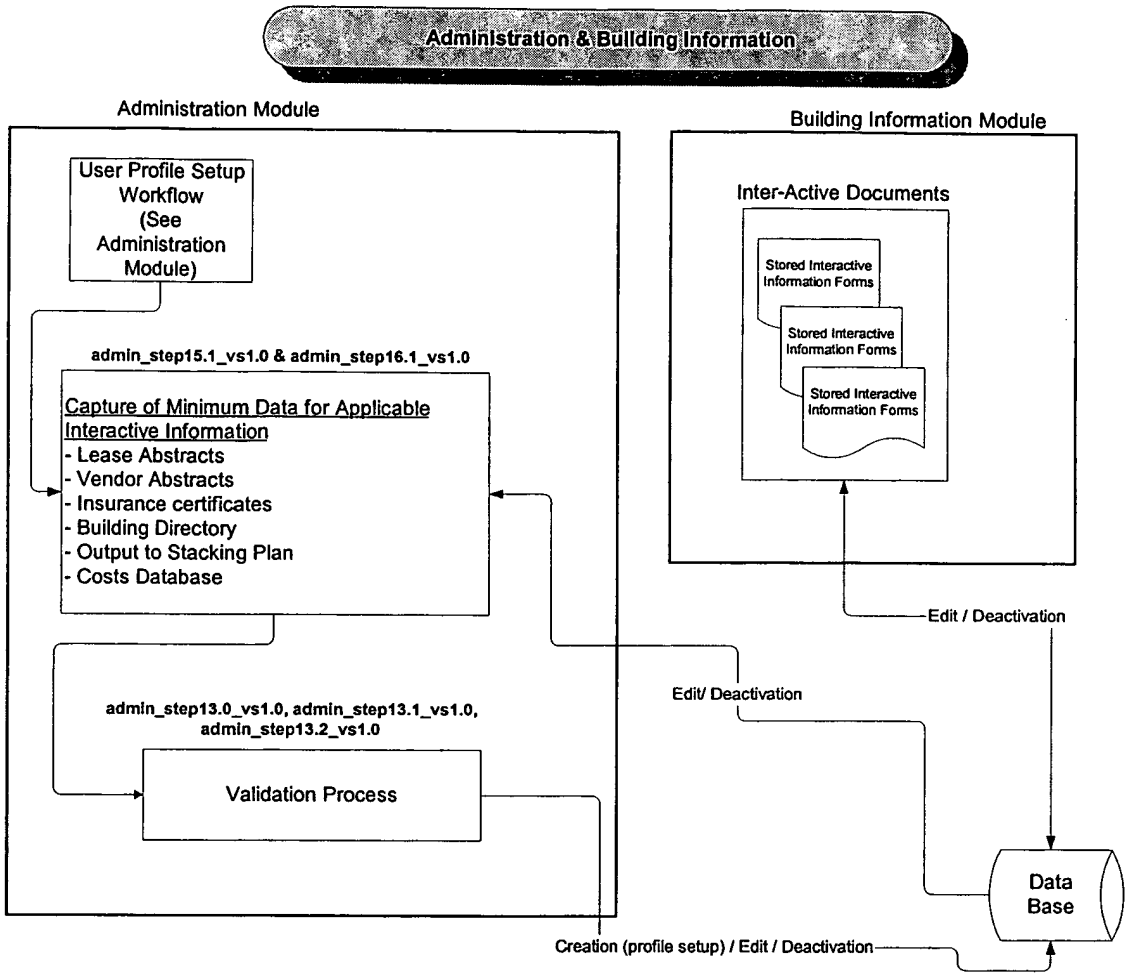
- Set up and Maintain Profile
- Sign In
- Administration & Communications Modules
- Administration and Building Information Modules
- Building Information Management

Set Up and Maintenance Profile




Sign In Process
System Generates an Email and Sends Sign In Id and Password to User
Start Process
New User
Existing User
User Input or Link to URL for Property or WorkSpeed Home Page
admin_step18.1_vs1.0
Process to re-issue User Id and Password Information
admin_step18.0_vs1.0
User Receives ID and Password Info
No
Yes
admin_step19.0_vs1.0
Browser and Operating System check
Requirements Met
No
Messaging and Prompt to Upgrade
Upgrade Browser?
Yes
Upgrade Process, includes download
Complete download process
Continue/End
System Requirements Process
End
Sign In Process
Forgot Password
Yes
admin_step20.0_vs1.0
Forgot Pasword Process
No
admin_step5.0_vs1.0
User Signs In w/ Id and Password
No
Yes
admin_step21.0_vs1.0
First Sign In Attempt
Yes
No
Accept Sign In
Continue
admin_step6.0_vs1.0
admin_step7.0_vs1.0
User is Prompted to Set Up a Permanent Password and Personalize ID
User Signs In Accepted and Proceeds based on User Role Level
admin_step22.0_vs1.0
admin_step23.0_vs1.0
User Access to Multiple Locations
No
Yes
admin_step24.0_vs1.0
No
Select Location to Access
admin_step13.0_vs1.0
Vallidation Process (See other Process Flow)
Yes
admin_step6.1_vs1.0
Logic to determine if User has multiple Roles associated to its User Profile
Multiple Roles
Yes
admin_step22.1_vs1.0
Welcome New User tutorial and screens
No
User is Prompted to Select Entity Role
admin_step6.2_vs1.0
admin_step7.1_vs1.0
Reset Passcode or User Name
Welcome and Start Up Menu Presented
No
End Process


Administration & Communications Modules
Administration Module
Communications Module
User Profile Setup Workflow (See Administration Module)
admin_step16.0_vs1.0 & admin_step16.1_vs1.0
Capture of Minimum Data for E-mail capability
- Name
- Title
- E-mail address
- Role
Dynamic E-mail Address List
Property Manager E-mail Address
Office Manager E-mail Address
Vendor E-mail Address
Look up/Query
Edit/ Replacement
admin_step13.0_vs1.0, admin_step13.1_vs1.0, admin_step13.2_vs1.0
Validation Process
Data Base
Creation (profile setup) / Edit / Deactivation


Administration & Building Information
Administration Module
Building Information Module
User Profile Setup Workflow (See Administration Module)
Inter-Active Documents
Stored Interactive Information Forms
Stored Interactive Information Forms
Stored Interactive Information Forms
admin_step15.1_vs1.0 & admin_step16.1_vs1.0
Capture of Minimum Data for Applicable Interactive Information
- Lease Abstracts
- Vendor Abstracts
- Insurance certificates
- Building Directory
- Output to Stacking Plan
- Costs Database
Edit / Deactivation
Edit/ Deactivation
admin_step13.0_vs1.0, admin_step13.1_vs1.0, admin_step13.2_vs1.0
Validation Process
Data Base
Creation (profile setup) / Edit / Deactivation

7 Additional Features to be Incorporated in Later Releases

Version 1 is scheduled for Beta testing beginning August 1, 2000 with the Administration and Service Request modules. The other V1 modules will follow as they are completed, with the Building Portal module scheduled for implementation on September 15, 2000.

Additional features/functionality will be added over time, based on customer needs and revenue opportunities. However, a "Building Operations" module will likely be implemented in the near term. Originally envisioned for Version 1, these features/functions required more development effort and were removed from the initial release.

7.1 Building Operations

The objective of the Building Operations module is to benefit the Property Management user constituency, by providing a centralized, easy to use process that coordinates and automates the tasks surrounding the maintenance and monitoring activities for the property. The Building Operations module will serve as a hub for coordinating:

- Building Preventative Maintenance activities
  - These are scheduled, recurring activities, that are required to maintain the physical building, including it's facilities, equipment, grounds, amenities, and systems. The workflow and physical tasks required to execute these activities mirror those of standard service requests, except for the initiation process. While a standard service request is initiated by a Workspeed user, preventative maintenance activities are triggered by a prompt from a Preventative Maintenance Activity Profile. These profiles, setup by the property management staff (most likely the Chief Engineer), define the maintenance activity, the individual responsible for performing the activity, the time that the activity should be performed, the frequency of execution, and the prompting method.

- Building Monitoring activities
  - Monitoring activities are similar to the preventative maintenance activities, except that that equipment and meter readings are monitored and recorded, instead of maintenance activities being executed.

- Automated logs to track property management personnel activities, equipment status, Fire Warden items, violations, etc.
  - The fire wardens' login feature is particularly unique and may warrant special attention in the patent application. This feature could be considered a way to increase security (utilizing electronic signatures), and could provide remote access to the login (from anywhere in the building and from the Fire Dept premises). It could also provide the ability to receive additional flash information (beacon), and potentially check at regular intervals a users presence in front of a computer. If we were to develop something like this, the patent could be about a new, on-line security system that might include other elements from the repository as well.

- Automated updates to the building security system regarding changes in building residents
  - BACKGROUND: Frequently the list of authorized people who have access to a building gets out of date. Periodically, a building may cancel and reissue all badges in order to get the list updated. This is both inconvenient to the tenants and costly to the owner.
  - FEATURE: Create an automated *tenant log* that can be compared to the security roster. Over time this could be seamlessly integrated into the building security system.
  - FEATURE: Build a confirmation step from security to the tenant office manger to check on expiring building passes to see if they're still valid– if no confirmation, security will cancel the passes.
  - KEY BENEFIT: Reduces hassle for tenants, reduces cost for owner.

- Automated vacancy credit notification and report
  - BACKGROUND: Owners enter into a contract with a cleaning company to clean the whole building (@ approx. $2/foot). The cleaning company and owner sign a contract, and provide a cleaning spec. The contract has a vacancy credit meaning the building gets money back for spaces not cleaned (e.g. when a tenant moves out).
  - FEATURE: Setup an automatic way to let the cleaning company know when tenants are leaving the building (potentially 30 days advance notice). This way the cleaning company cannot come back and say they weren't told about the vacancy. The system should also create and potentially send a vacancy credit report each month to the owner, property manager and vendor.
  - KEY BENEFIT: This feature will help maximize revenue for the owner by ensuring that the appropriate monthly vacancy credit is applied.

- Automated insurance certificate expiration tracking and reminders
  - BACKGROUND: Insurance certificates must be maintained for all tenants and vendors who come into the building. These certificates are required before vendors can proceed with a job and before tenants can move into a building. Keeping track of the certificates can be a difficult task in a large office building and yet it is vital from a risk perspective that all certificates are up to date.
  - FEATURE: Set up a log /reminder feature to track each tenant and vendor's insurance certificate.
  - KEY BENEFIT: Makes life easier for the property manager. Helps reduce the risk of having a tenant or vendor working in the building without a valid insurance certificate.

- Online stacking plan

- Valet Parking System

  - This could be a parking system where the valet would use a Wireless Access Protocol (WAP)-based solution to signal the storage of a car (car # and spot #), then retrieve its location on request and finally signal availability, based on the repository mapping cars and tenant employees. Such a system, allowing for a better management of spots, keys, etc. might be innovative enough to be patented.

From: Gordon Coplein <gcoplein@inet-systems.net>
To: Bruce Deming <bdeming@workspeed.com>
Date: 6/7/00 11:58am
Subject: Re: WorkSpeed Specifications

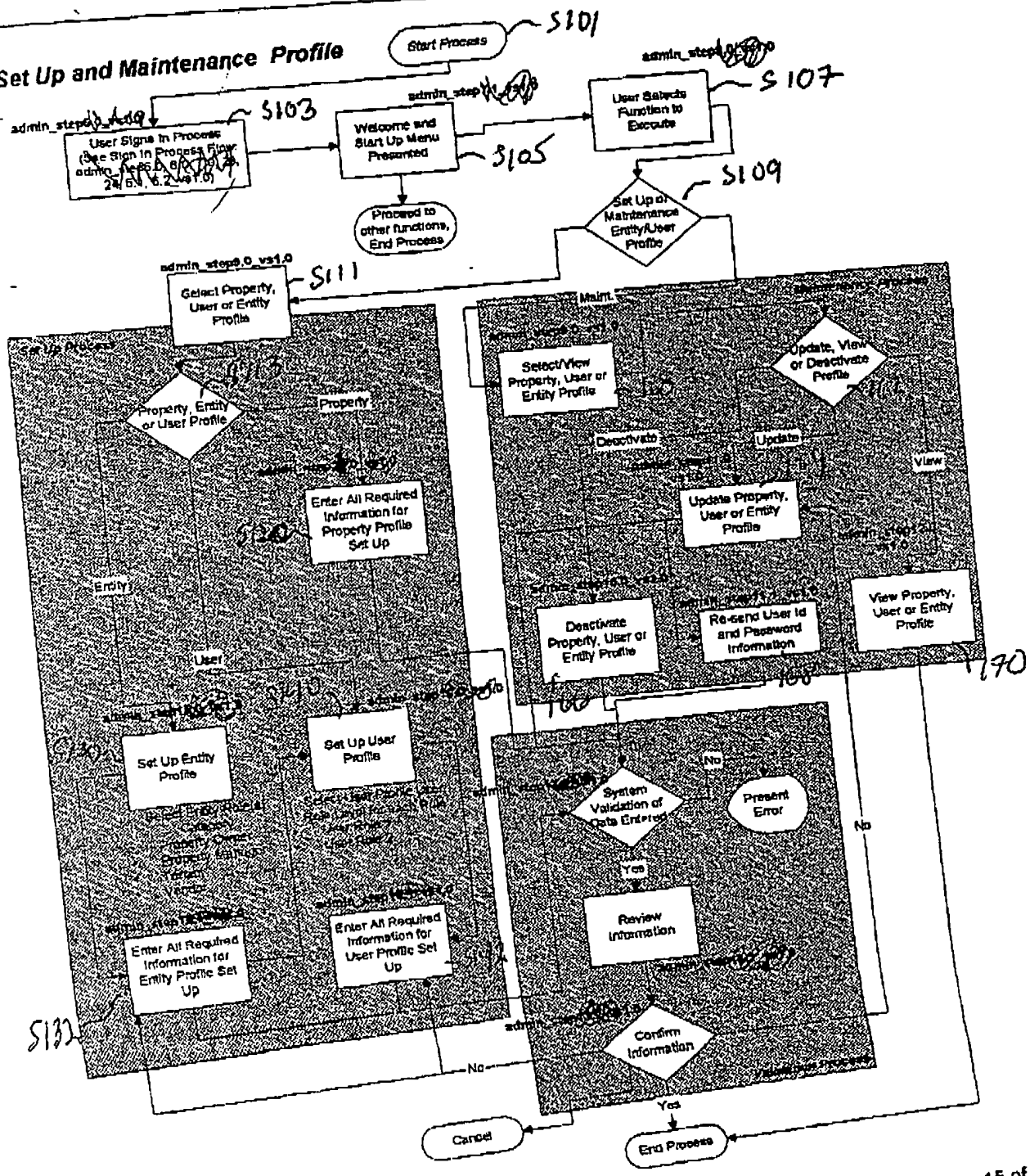
Bruce,

The document was received. I have not completely reviewed it but it looks quite satisfactory
for my needs.

Gordon Coplein

Bruce Deming wrote:

> Gordon,
>
> I'm forwarding a memo prepared by Melissa Gregson, one of our product
> development people. It does a good job of outlining the specific features
> of the workflow system in the near term; however, it does not reflect the
> ultimate vision of the product. After you've had a chance to review the
> document, give me a call with any questions.
>
> Thanks.
>
> -- Bruce
>
> ---
> Name: V1 Overview for Patent App 6-3-00_.doc
> V1 Overview for Patent App 6-3-00_.doc Type: doc (application/msword)
> Encoding: base64



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MAY-17-2004 22:56 From:GORDON COPLEIN 770 393 2616 To:RiohLFax P.3/4
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